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NATIONAL STATISTICAL INSTITUTE

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**FINAL QUALITY REPORT**  
**EU-SILC 2006\_2007\_2008\_2009**

**BULGARIA**

**SOFIA, December 2011**

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## **INTRODUCTION**

The Survey on Income and Living Conditions (SILC) in Bulgaria is an annual survey implemented by the NSI in the framework of Regulation (EC) No 1177/2003 of the European Parliament and of the Council. Basic aim of the survey is the study, both at European and national level of households' living conditions in relation to their income. The survey is the reference for comparative statistics on income distribution and social exclusion in the European Union.

In 2009, the survey was carried-out by the National Statistical Institute with the funds supplied by Eurostat Grant nr. 10602.2008.003-2008.143.

This document presents the Final Quality Report of EU-SILC 2009 in Bulgaria and follows the structure outlined in the Commission Regulation No. 28/2004. In 2009 the EU-SILC operation contains a panel rotation that extends to four consecutive years for the first time. Rotation 4, which started in 2006 and has been traced until 2009, represents the first full longitudinal component. This is the first possibility to calculate the longitudinal at-persistent-risk-of-poverty indicator.

## 1. COMMON LONGITUDINAL EUROPEAN UNION INDICATORS BASED ON THE LONGITUDINAL COMPONENT OF EU-SILC

The longitudinal dataset 2006-2009 of the EU-SILC operation comprises a panel of four years for the first time. The main objective of the four years panel rotation is to deliver an adequate data basis for the calculation of the at-persistent-risk-of-poverty indicator. Persistent at risk of poverty occurs when a panel person is at risk of poverty in the last wave (2009) and in at least two of the preceding three years.

The indicators below have been calculated using Eurostat SAS program.

**Table 1. Persistent At-risk-of-poverty rate**

		LIP_MD60	LIP_MD50
<b>TOTAL</b>	<b>TOTAL</b>	10.7	6
	Y18_24	10.3	5.6
	Y18_64	8.1	5.1
	Y25_49	8.2	5.2
	Y50_64	6.8	4.7
	Y_GE18	9.9	5.3
	Y_GE65	15.9	5.8
	Y_LT18	15.8	10.3
<b>MALE</b>	<b>TOTAL</b>	9.8	5.7
	Y18_24	10.3	5
	Y18_64	7.5	4.9
	Y25_49	7.7	4.8
	Y50_64	5.6	5.1
	Y_GE18	8.2	4.6
	Y_GE65	11.3	3.2
<b>FEMALE</b>	<b>TOTAL</b>	11.5	6.3
	Y18_24	10.2	6.2
	Y18_64	8.6	5.3
	Y25_49	8.9	5.7
	Y50_64	7.7	4.4
	Y_GE18	11.4	5.9
	Y_GE65	19	7.6

## **2. ACCURACY**

### **2.1. Sample design**

#### **2.1.1. Type of sampling design**

Four-year rotation panel is used for EU-SILC in Bulgaria. It contains 4 independent sub-samples and follows stratified two-stage cluster sampling design. In each subsequent year of survey one rotational group was excluded and new one was added.

Separated strata are formed based on the country administrative-territorial division. All private households in the country are covered.

The longitudinal data of EU-SILC 2006, 2007, 2008 and 2009 were the data of the first, second, third and fourth waves of EU-SILC in Bulgaria. The longitudinal data consisted of the 3 rotational groups: forth group of year 2006, 2007, 2008 and 2009; first group - of year 2007, 2008 and 2009, and second group – 2008 and 2009.

#### **2.1.2. Sampling units**

Two stages sampling on a territorial principle is implemented as follows:

- on the first stage - the census enumeration units (PSU) are selected;
- on the second stage - the households are identified.

#### **2.1.3. Stratification and sub-stratification criteria**

The general population and administrative-territorial division by statistical districts of the settlement comprises all the households in the country. Population census 2001 data base was used as sampling frame. The sampling frame was updated according to the administrative changes occurred in human settlements statute in Bulgaria – some villages was recognized as towns; transition of municipalities or settlements from one administrative district to another.

The sample is stratified by administrative-territorial districts in the country (NUTS3) and the household's location. As a result 56 strata are formed (28 of urban and 28 of rural population). Municipalities and settlements are ranged according to the number of their population within each stratum.

#### **2.1.4. Sample size and allocation criteria**

The necessary sample size for Bulgaria is determined in the Annex II of the Framework Regulation (1177/2003) to guarantee an effective sample size with regard to the at-risk-of-poverty indicator of 4500 households. The longitudinal sample for two successive waves should comprise at least 3500 households.

The total gross sample size (number of households) has been made by analyzing the non-response rates and design effects of the previous EU-SILC surveys.

The sampling frame is divided into 56 strata. Different response rates within the strata are obtained in 2006 and 2007, therefore a decision is taken to oversample strata in which lower response rates are expected. Data from 2008 EU-SILC is used for oversampling.

Hence, the total sample size in 2009 is 7354 households:

- 4439 “old” (longitudinal 2006, 2007 and 2008),
- 2915 “new” households (drawn in 2009).

#### **2.1.5. Sample selection schemes**

The number of census enumeration units (PSU) is calculated for each strata included in the sample.

The clusters on the first stage are chosen with probability proportion to population size (number of households) in the PSUs. Systematic sampling of secondary units (households) in each primary unit Selected is applied. Each PSU contains 5 households.

#### **2.1.6. Sample distribution over time**

Survey for the reference year 2005 was carried out from July to September 2006.

Survey for the reference year 2006 was carried out from May to August 2007.

Survey for the reference year 2007 was carried out from April to July 2008.

Survey for the reference year 2008 was carried out from April to July 2009.

#### **2.1.7. Renewal of sample: rotational groups**

Bulgaria applies a rotational panel in which the sample is divided into four sub-samples. Each of them is representing the whole population. Each year one of the rotation groups is dropped out and a new one is added to the sample.

2006 is the first year of EU-SILC in Bulgaria. The 6120 selected households are divided into 4 rotational groups with equal size. In 2007 the first rotational group (with a size 1530) is dropped out and 1530 new households are chosen. The rotational group 2 (with a size 1451) is dropped out in 2008 and 2935 new households are added as rotational group 6. In 2009 the third rotational group (with a size 1072) is dropped out and 2915 new households are added as rotational group 7.

The sample size for longitudinal component for Bulgaria was 12425 households, or 30503 persons aged 16 and over.

**Table 2 Number of selected households in longitudinal component of EU SILC survey**

		Rotational group			Total
		1	2	4	
Year of the survey	2006	0	0	1530	1530
	2007	1530	0	1064	2594
	2008	1075	2935	958	4968
	2009	854	1691	788	3333
Total		3459	4626	4340	12425

DB135=1		Rotational group			Total
		1	2	4	
Year of the survey	2006	0	0	1058	1058
	2007	1039	0	929	1968
	2008	841	1682	775	3298
	2009	826	1625	759	3210
Total		2706	3307	3521	9534

### 2.1.8. Weightings

The chapter describes the computations of weights of longitudinal EU-SILC BG 2006-2009.

The longitudinal data sets EU-SILC BG 2006-2009 contain information on individuals of the following subsamples:

*R4* – rotational group 4 is a sample of households with which the survey was conducted for the first time in 2006. The numbers of each sampled household participate in the survey for four consecutive years.

*R5* – rotational group 5 is a sample of households with which the survey was conducted for the first time in 2007. The numbers of each sampled household participate in the survey for three consecutive years (replaced 1<sup>st</sup> rotational group);

*R6* – rotational group 6 is a sample of households with which the survey was conducted for the first time in 2008. The numbers of each sampled household participate in the survey for two consecutive years (replaced 2<sup>d</sup> rotational group);

Base weights of each year are calculated independently for each subsample.

#### *1st wave of EU-SILC longitudinal component*

##### 2.1.8.1. Design factor

For the first year of the survey, the design weights are equal to the inverses of the corresponding household inclusion probabilities. These weights are household design weights DB080.

### **2.1.8.2. Non-response adjustments**

Correction for non-response at first year of subsamples was done with weighting within classes procedures:

The design weights were modified by a factor inversely proportional to the response rate within strata. Coefficients of these corrections were computed separately according to classes of locality as ratios: the sum of design weights of selected units to the sum of design weights of responding units.

### **2.1.8.3. Adjustment to external data (level, variables used and sources)**

Weights calculated at the previous step are adjusted to external sources. Calibration is done on individual-level data, imposing equality of g-weights for individuals in the same household. Truncated linear function is used in order to limit g-weights close enough to 1.

The following external information was used:

- Region (NUTS 2)
- Residence – urban/rural
- Age groups and gender

This information was derived from the Information System Demography (ISD). Calibration was carried out with a G calib2.0 program (designed by Statistics Belgium).

#### *Final cross-sectional weights*

After calibration we get the final *household cross-sectional weight DB090* is get.

*Personal cross-sectional weight of an individual(RB050)* is equal to the cross-sectional weight DB090 of its household.

*Personal cross-sectional weights for all household members aged 16 and over (PB040)* are obtained by correction for within household non-response of the RB050. After that the same calibration method as described above is used in order to adjust the weights to external sources.

*Children cross-sectional weight (RL070)*. The weights are calculated as the number of children in each one-year group (0-12 years) in the population divided by the number of children in one-year groups in the households interviewed.

### **2.1.8.4. Final longitudinal weight**

In the first wave the longitudinal base weights are identical to the design weights after non-response adjustment and calibration.

#### *2nd and subsequent waves of EU-SILC longitudinal component*

### **2.1.8.5. Non-response adjustments**

Each new subsample is an usual random sample from population and does not depend on other subsamples. The 2007, 2008 and 2009 base weights for the new subsamples are calculated according to the above described steps.

The weights for the rest subsamples are obtained with the following procedure.

### Correction for attrition

Prior to any corrections his needed to exclude from consideration persons that became out-of-scope in 2007, 2008 and 2009 as they are not considered as non-response. Out-of-scope are person that were dead, became institutionalized or had left the country for longer period.

Within the frame of respondents and non-respondents logistic regression model was applied to calculate the response probability of each person. The following variables were used in the model:

- strata
- size of household
- sex
- age group
- activity
- educational level
- poverty and deprivation indicators

This procedure was applied **between** years:

Subsample *R4* (four years of participation) - 2006 - 2007, 2007 - 2008 and 2008 - 2009

Subsample *R5* (three years of participation) - 2007 - 2008 and 2008 - 2009;

Subsample *R6* (two years of participation) - 2008 - 2009;

Base weights for persons entering panel households for the first time were calculated as follows:

- for children born to sample women - the base weight is equal to the mother's base weight;
- for persons moving into sample household from outside the survey population – the base weight is the average of base weights of existing household members;
- for persons moving into sample households from other non-sample households in the population (co-residents) the base weight is a basic panel weight equal to zero;

Average of these weights over all household members (including co-residents) is assigned to each member. The new co-residents continue to be assigned a zero base weight.

#### **2.1.8.6. Adjustments to external data (level, variables used and sources)**

The last stage of calculations consisted in combining the four independent subsamples applying the above described calibration technique.

As a result, household cross-sectional weight DB090 and personal cross-sectional weight RB050 are obtained for individuals from one subsample surveyed for the first time, one subsample surveyed for the second time, one subsample for the third time and from one subsample surveyed for the fourth time.

#### **2.1.8.7. Final longitudinal weight**

Weights were recalculated according to the duration of longitudinal data files (taking into account that each rotational group represents the population of Bulgaria):

For the second and subsequent waves of the longitudinal component the base weights (RB060) are computed using the cross-sectional base weights (RB050) adjusted for panel attrition. A rescaling of weights is carried out so to reflect the total target population.

The weights RB062, RB063 and RB064 are computed, respectively for the 2-year, the 3-year and the 4-year longitudinal sets.

The longitudinal weight RB062 is computed by dividing RB060 by 3, the longitudinal weight RB063 is computed by dividing RB060 by 2 and the longitudinal weight RB064 by dividing RB060 by 4.

#### 2.1.8.8. Final household cross-sectional weight

The final cross-sectional weights DB090 = RB050 were calculated as a product of the initial weights after non-response adjustment and calibration.

#### 2.1.9. Substitutions

No substitution was applied if the household did not enter the survey.

### 2.2. Sampling errors

#### 2.2.1. Standard error and effective sample size

Computations of standard errors were carried out using SAS programs for the SILC Final Quality Report

*Table 3 Mean, total number of observations (before and after imputation) and standard error for income components 2006, longitudinal component (households & persons, weighted mean)*

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	6 568	693	1 058	209
Total disposable household income (HY020)	5 503	267	1 058	163
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	5 179	276	1 058	166
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	3 757	433	1 058	172
<b>Net income components at household level</b>				
Income from rental of a property or land (HY040N)	420	186	186	76
Family related allowances (HY050N)	395	284	284	22
Social exclusion not elsewhere classified (HY060N)	346	194	244	25
Housing allowance (HY070N)	240	1	1	74
Regular inter-household cash transfer received (HY080N)	810	83	83	97
Interests, dividends, etc. (HY090N)	8000	1	1	1739
Interest repayments on mortgage (HY100N)	1768	32	32	220
Income received by people aged < 16 (HY110N)	878	13	13	133
Taxes on wealth (HY120N)	47	843	905	1
Regular inter-household cash transfer paid (HY130N)	711	37	37	168
Tax on income and social contributions (HY140N)	1440	586	586	75
<b>Gross income components at household level</b>				
Income from rental of a property or land (HY040G)	429	186	186	79
Family related allowances (HY050G)	395	284	284	22

Social exclusion not elsewhere classified (HY060G)	346	194	244	25
Housing allowance (HY070G)	240	1	1	74
Regular inter-household cash transfer received (HY080G)	810	83	83	97
Interests, dividends, etc. (HY090G)	10000	1	1	2173
Interest repayments on mortgage (HY100G)	1768	32	32	220
Income received by people aged < 16 (HY110G)	878	13	13	133
Taxes on wealth (HY120G)	47	843	905	1
Regular inter-household cash transfer paid (HY130G)	711	37	37	168
Tax on income and social contributions (HY140G)	1440	586	586	75
<b>Net income components at personal level</b>				
Employee cash or near cash income (PY010N)	3120	769	1073	72
Net non-cash employee income (PY020N)	1357	41	41	95
Cash benefits or losses from self-employment (PY050N)	3377	175	217	375
Value of goods produced by own-consumption (PY070N)	625	340	340	34
Pension from individual private plans (PY080N)	.	.	.	.
Unemployment benefits (PY090N)	630	35	35	113
Old age benefits (PY100N)	1620	851	859	44
Survivor's benefits (PY110N)	348	70	70	29
Sickness benefits (PY120N)	668	18	18	195
Disability benefits (PY130N)	773	92	95	72
Education-related allowances (PY140N)	330	46	46	95
<b>Gross income components at personal level</b>				
Employee cash or near cash income (PY010G)	3791	672	1073	91
Net non-cash employee income (PY020G)	1357	41	41	95
Cash benefits or losses from self-employment (PY050G)	3955	181	217	528
Value of goods produced by own-consumption (PY070G)	625	340	340	34
Pension from individual private plans (PY080G)	.	.	.	.
Unemployment benefits (PY090G)	630	35	35	113
Old age benefits (PY100G)	1620	851	859	44
Survivor's benefits (PY110G)	348	70	70	29
Sickness benefits (PY120G)	668	18	18	195
Disability benefits (PY130G)	773	92	95	72
Education-related allowances (PY140G)	330	46	46	95

**Table 4 Mean, total number of observations (before and after imputation) and standard error for income components 2007, longitudinal component (households & persons, weighted mean)**

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	7310	801	1968	175
Total disposable household income (HY020)	6199	801	1968	141
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	5924	698	1968	142
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	4609	359	1968	153
<b>Net income components at household level</b>				
Income from rental of a property or land (HY040N)	357	279	279	45

Family related allowances (HY050N)	386	401	401	22
Social exclusion not elsewhere classified (HY060N)	333	317	317	27
Housing allowance (HY070N)	240	1	1	56
Regular inter-household cash transfer received (HY080N)	807	184	184	81
Interests, dividends, etc. (HY090N)	520	11	11	233
Interest repayments on mortgage (HY100N)	2752	42	42	332
Income received by people aged < 16 (HY110N)	451	12	12	126
Taxes on wealth (HY120N)	123	1630	1630	4
Regular inter-household cash transfer paid (HY130N)	747	115	115	149
Tax on income and social contributions (HY140N)	1592	1130	1130	57
<b><i>Gross income components at household level</i></b>				
Income from rental of a property or land (HY040G)	369	279	279	50
Family related allowances (HY050G)	386	401	401	22
Social exclusion not elsewhere classified (HY060G)	333	317	317	27
Housing allowance (HY070G)	240	1	1	56
Regular inter-household cash transfer received (HY080G)	807	184	184	81
Interests, dividends, etc. (HY090G)	555	11	11	253
Interest repayments on mortgage (HY100G)	2752	42	42	332
Income received by people aged < 16 (HY110G)	451	12	12	126
Taxes on wealth (HY120G)	123	1630	1630	4
Regular inter-household cash transfer paid (HY130G)	747	115	115	149
Tax on income and social contributions (HY140G)	1592	1130	1130	57
<b><i>Net income components at personal level</i></b>				
Employee cash or near cash income (PY010N)	3351	1165	2020	58
Net non-cash employee income (PY020N)	406	331	331	31
Contribution to individual private pension plans (PY035N)	181	93	93	24
Cash benefits or losses from self-employment (PY050N)	2880	565	672	282
Value of goods produced by own-consumption (PY070N)	653	677	677	33
Pension from individual private plans (PY080N)	.	.	.	.
Unemployment benefits (PY090N)	730	36	36	98
Old age benefits (PY100N)	1707	1549	1609	23
Survivor's benefits (PY110N)	725	28	28	100
Sickness benefits (PY120N)	765	44	44	486
Disability benefits (PY130N)	944	216	216	56
Education-related allowances (PY140N)	234	2	2	133
<b><i>Gross income components at personal level</i></b>				
Employee cash or near cash income (PY010G)	4125	863	2020	77
Net non-cash employee income (PY020G)	406	331	331	31
Contribution to individual private pension plans (PY035G)	181	93	93	24
Cash benefits or losses from self-employment (PY050G)	3269	555	672	343
Value of goods produced by own-consumption (PY070G)	653	677	677	33
Pension from individual private plans (PY080G)	.	.	.	.
Unemployment benefits (PY090G)	730	36	36	98
Old age benefits (PY100G)	1707	1549	1609	23
Survivor's benefits (PY110G)	725	28	28	100
Sickness benefits (PY120G)	765	44	44	486
Disability benefits (PY130G)	944	216	216	56
Education-related allowances (PY140G)	234	2	2	133

**Table 5 Mean, total number of observations (before and after imputation) and standard error for income components 2008, longitudinal component (households & persons, weighted mean)**

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	11143	550	3298	232
Total disposable household income (HY020)	9693	126	3298	204
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	9164	1151	3298	204
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	7535	1034	3298	215
<b>Net income components at household level</b>				
Income from rental of a property or land (HY040N)	504	450	463	70
Family related allowances (HY050N)	739	580	621	40
Social exclusion not elsewhere classified (HY060N)	319	328	338	30
Housing allowance (HY070N)	232	2	2	45
Regular inter-household cash transfer received (HY080N)	1451	457	457	115
Interests, dividends, etc. (HY090N)	4736	13	13	1472
Interest repayments on mortgage (HY100N)	1981	239	239	111
Income received by people aged < 16 (HY110N)	568	34	34	94
Taxes on wealth (HY120N)	51	2564	2564	1
Regular inter-household cash transfer paid (HY130N)	580	584	584	39
Tax on income and social contributions (HY140N)	2192	32	1828	57
<b>Gross income components at household level</b>				
Income from rental of a property or land (HY040G)	507	451	463	70
Family related allowances (HY050G)	739	580	621	40
Social exclusion not elsewhere classified (HY060G)	319	328	338	30
Housing allowance (HY070G)	232	2	2	45
Regular inter-household cash transfer received (HY080G)	1451	457	457	115
Interests, dividends, etc. (HY090G)	5421	13	13	1776
Interest repayments on mortgage (HY100G)	1981	239	239	111
Income received by people aged < 16 (HY110G)	568	34	34	94
Taxes on wealth (HY120G)	51	2564	2564	1
Regular inter-household cash transfer paid (HY130G)	580	584	584	39
Tax on income and social contributions (HY140G)	2192	32	1828	57
<b>Net income components at personal level</b>				
Employee cash or near cash income (PY010N)	4114	2617	3983	73
Net non-cash employee income (PY020N)	509	538	538	31
Contribution to individual private pension plans (PY035N)	227	225	225	24
Cash benefits or losses from self-employment (PY050N)	6649	526	641	551
Value of goods produced by own-consumption (PY070N)	600	1315	1315	35
Pension from individual private plans (PY080N)	360	2	2	64
Unemployment benefits (PY090N)	940	61	61	155
Old age benefits (PY100N)	2148	2531	2713	23
Survivor's benefits (PY110N)	340	773	773	12
Sickness benefits (PY120N)	888	40	40	398
Disability benefits (PY130N)	983	43	645	39

Education-related allowances (PY140N)	479	59	59	145
<b>Gross income components at personal level</b>				
Employee cash or near cash income (PY010G)	5421	2161	3983	95
Net non-cash employee income (PY020G)	509	538	538	31
Contribution to individual private pension plans (PY035G)	227	225	225	24
Cash benefits or losses from self-employment (PY050G)	7494	508	641	606
Value of goods produced by own-consumption (PY070G)	600	1315	1315	35
Pension from individual private plans (PY080G)	360	2	2	64
Unemployment benefits (PY090G)	940	61	61	155
Old age benefits (PY100G)	2148	2531	2713	23
Survivor's benefits (PY110G)	340	773	773	12
Sickness benefits (PY120G)	888	40	40	398
Disability benefits (PY130G)	983	43	645	39
Education-related allowances (PY140G)	479	59	59	145

**Table 6 Mean, total number of observations (before and after imputation) and standard error for income components 2009, longitudinal component (households & persons, weighted mean)**

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	13106	943	3210	247
Total disposable household income (HY020)	11586	905	3210	213
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	10848	987	3210	212
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	8897	1393	3210	221
<b>Net income components at household level</b>				
Income from rental of a property or land (HY040N)	1080	437	457	273
Family related allowances (HY050N)	875	607	609	45
Social exclusion not elsewhere classified (HY060N)	489	128	264	38
Housing allowance (HY070N)	.	.	.	.
Regular inter-household cash transfer received (HY080N)	1571	386	408	113
Interests, dividends, etc. (HY090N)	7444	8	8	2169
Interest repayments on mortgage (HY100N)	2430	203	203	160
Income received by people aged < 16 (HY110N)	708	29	29	117
Taxes on wealth (HY120N)	59	2417	2427	1
Regular inter-household cash transfer paid (HY130N)	685	507	508	62
Tax on income and social contributions (HY140N)	2161	600	1885	50
<b>Gross income components at household level</b>				
Income from rental of a property or land (HY040G)	1168	457	457	305
Family related allowances (HY050G)	875	608	609	45
Social exclusion not elsewhere classified (HY060G)	489	128	264	38
Housing allowance (HY070G)	.	.	.	.
Regular inter-household cash transfer received (HY080G)	1571	386	408	113
Interests, dividends, etc. (HY090G)	8594	8	8	2477
Interest repayments on mortgage (HY100G)	2430	203	203	160
Income received by people aged < 16 (HY110G)	708	29	29	117
Taxes on wealth (HY120G)	59	2417	2427	1

Regular inter-household cash transfer paid (HY130G)	685	507	508	62
Tax on income and social contributions (HY140G)	2161	600	1885	50
<b>Net income components at personal level</b>				
Employee cash or near cash income (PY010N)	5316	1630	3559	86
Net non-cash employee income (PY020N)	1741	538	538	777
Contribution to individual private pension plans (PY035N)	167	212	212	14
Cash benefits or losses from self-employment (PY050N)	8048	338	468	542
Value of goods produced by own-consumption (PY070N)	630	1214	1214	32
Pension from individual private plans (PY080N)	1527	2	2	1123
Unemployment benefits (PY090N)	695	52	130	65
Old age benefits (PY100N)	2688	2454	2465	28
Survivor's benefits (PY110N)	1340	75	79	124
Sickness benefits (PY120N)	389	797	813	35
Disability benefits (PY130N)	1715	495	654	55
Education-related allowances (PY140N)	320	50	51	48
<b>Gross income components at personal level</b>				
Employee cash or near cash income (PY010G)	7092	1142	3559	118
Net non-cash employee income (PY020G)	1741	538	538	777
Contribution to individual private pension plans (PY035G)	167	212	212	14
Cash benefits or losses from self-employment (PY050G)	9129	336	468	622
Value of goods produced by own-consumption (PY070G)	630	1214	1214	32
Pension from individual private plans (PY080G)	1527	2	2	1123
Unemployment benefits (PY090G)	721	50	130	68
Old age benefits (PY100G)	2688	2454	2465	28
Survivor's benefits (PY110G)	1340	79	79	124
Sickness benefits (PY120G)	403	797	813	37
Disability benefits (PY130G)	1715	495	654	55
Education-related allowances (PY140G)	320	50	51	48

**Table 7 Mean, total number of observations (before and after imputation) and standard error for income components 2006 (households & persons, weighted mean, cross sectional sample 2006)**

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	6 639	2784	4 341	107
Total disposable household income (HY020)	5 702	1126	4 341	83
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	5 374	1141	4 341	85
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	3 994	1702	4 341	90
<b>Net income components at household level</b>				
Income from rental of a property or land (HY040N)	368	671	671	31
Family related allowances (HY050N)	382	1190	1 190	9
Social exclusion not elsewhere classified (HY060N)	347	883	1 072	14
Housing allowance (HY070N)	149	3	3	49
Regular inter-household cash transfer received (HY080N)	944	344	351	86
Interests, dividends, etc. (HY090N)	2 570	4	4	2 545

Interest repayments on mortgage (HY100N)	1 802	93	93	143
Income received by people aged < 16 (HY110N)	763	51	51	74
Taxes on wealth (HY120N)	43	3457	3 690	1
Regular inter-household cash transfer paid (HY130N)	752	171	171	84
Tax on income and social contributions (HY140N)	1 481	2377	2 377	41
<b><i>Gross income components at household level</i></b>				
Income from rental of a property or land (HY040G)	371	671	671	32
Family related allowances (HY050G)	382	1190	1 190	9
Social exclusion not elsewhere classified (HY060G)	347	883	1 072	14
Housing allowance (HY070G)	149	3	3	49
Regular inter-household cash transfer received (HY080G)	944	344	351	86
Interests, dividends, etc. (HY090G)	3 161	4	4	3 208
Interest repayments on mortgage (HY100G)	1 802	93	93	143
Income received by people aged < 16 (HY110G)	763	51	51	74
Taxes on wealth (HY120G)	43	3457	3 690	1
Regular inter-household cash transfer paid (HY130G)	752	171	171	84
Tax on income and social contributions (HY140G)	1 481	2377	2 377	41
<b><i>Net income components at personal level</i></b>				
Employee cash or near cash income (PY010N)	3 186	3009	4 308	45
Net non-cash employee income (PY020N)	1 415	125	125	49
Cash benefits or losses from self-employment (PY050N)	3 422	668	813	207
Value of goods produced by own-consumption (PY070N)	625	1370	1 370	22
Pension from individual private plans (PY080N)	.	.	.	.
Unemployment benefits (PY090N)	670	144	144	45
Old age benefits (PY100N)	1 577	3416	3 436	17
Survivor's benefits (PY110N)	369	412	417	18
Sickness benefits (PY120N)	605	65	65	82
Disability benefits (PY130N)	838	507	515	32
Education-related allowances (PY140N)	296	153	153	40
<b><i>Gross income components at personal level</i></b>				
Employee cash or near cash income (PY010G)	3 904	2475	4 308	60
Net non-cash employee income (PY020G)	1 415	125	125	49
Cash benefits or losses from self-employment (PY050G)	3 964	697	813	255
Value of goods produced by own-consumption (PY070G)	625	1370	1 370	22
Pension from individual private plans (PY080G)	.	.	.	.
Unemployment benefits (PY090G)	670	144	144	45
Old age benefits (PY100G)	1 577	3416	3 436	17
Survivor's benefits (PY110G)	369	412	417	18
Sickness benefits (PY120G)	605	65	65	82
Disability benefits (PY130G)	838	507	515	32
Education-related allowances (PY140G)	296	153	153	40
Gross monthly earnings for employees (PY200G)	354	2984	4 023	5

**Table 8 Mean, total number of observations (before and after imputation) and standard error for income components 2007 (households & persons, weighted mean, cross sectional sample 2007)**

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	7275	1 735	4270	130
Total disposable household income (HY020)	6152	1 731	4270	106
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	5900	1 529	4270	107
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	4672	759	4270	111
<b><i>Net income components at household level</i></b>				
Income from rental of a property or land (HY040N)	355	562	562	35
Family related allowances (HY050N)	384	836	836	16
Social exclusion not elsewhere classified (HY060N)	325	730	730	17
Housing allowance (HY070N)	299	3	3	154
Regular inter-household cash transfer received (HY080N)	903	379	379	66
Interests, dividends, etc. (HY090N)	416	15	15	170
Interest repayments on mortgage (HY100N)	2542	86	86	214
Income received by people aged < 16 (HY110N)	463	69	69	65
Taxes on wealth (HY120N)	120	3 505	3505	3
Regular inter-household cash transfer paid (HY130N)	668	227	227	80
Tax on income and social contributions (HY140N)	1633	2 436	2436	40
<b><i>Gross income components at household level</i></b>				
Income from rental of a property or land (HY040G)	361	562	562	36
Family related allowances (HY050G)	384	836	836	16
Social exclusion not elsewhere classified (HY060G)	325	730	730	17
Housing allowance (HY070G)	299	3	3	154
Regular inter-household cash transfer received (HY080G)	903	379	379	66
Interests, dividends, etc. (HY090G)	432	15	15	175
Interest repayments on mortgage (HY100G)	2542	86	86	214
Income received by people aged < 16 (HY110G)	463	69	69	65
Taxes on wealth (HY120G)	120	3 505	3505	3
Regular inter-household cash transfer paid (HY130G)	668	227	227	80
Tax on income and social contributions (HY140G)	1633	2 436	2436	40
<b><i>Net income components at personal level</i></b>				
Employee cash or near cash income (PY010N)	3428	2469	4366	49
Net non-cash employee income (PY020N)	409	634	634	25
Cash benefits or losses from self-employment (PY050N)	2789	1157	1402	200
Value of goods produced by own-consumption (PY070N)	604	1451	1451	22
Pension from individual private plans (PY080N)	632	2	2	520
Unemployment benefits (PY090N)	795	77	77	87
Old age benefits (PY100N)	1709	3273	3386	17
Survivor's benefits (PY110N)	858	64	64	89
Sickness benefits (PY120N)	366	110	110	94
Disability benefits (PY130N)	919	464	464	33
Education-related allowances (PY140N)	330	19	19	225
<b><i>Gross income components at personal level</i></b>				

Employee cash or near cash income (PY010G)	4229	1790	4366	64
Net non-cash employee income (PY020G)	409	634	634	25
Cash benefits or losses from self-employment (PY050G)	3183	1122	1402	236
Value of goods produced by own-consumption (PY070G)	604	1451	1451	22
Pension from individual private plans (PY080G)	632	2	2	520
Unemployment benefits (PY090G)	795	77	77	87
Old age benefits (PY100G)	1709	3273	3386	17
Survivor's benefits (PY110G)	858	64	64	89
Sickness benefits (PY120G)	366	110	110	94
Disability benefits (PY130G)	919	464	464	33
Education-related allowances (PY140G)	330	19	19	225
Gross monthly earnings for employees (PY200G)	386	2914	3984	5

**Table 9 Mean, total number of observations (before and after imputation) and standard error for income components 2008 (households & persons, weighted mean, cross sectional sample 2008)**

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	11342	743	4344	226
Total disposable household income (HY020)	9790	158	4344	201
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	9251	1 515	4344	201
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	7740	1365	4344	208
<b>Net income components at household level</b>				
Income from rental of a property or land (HY040N)	507	569	582	51
Family related allowances (HY050N)	765	789	840	43
Social exclusion not elsewhere classified (HY060N)	314	461	479	28
Housing allowance (HY070N)	234	2	2	46
Regular inter-household cash transfer received (HY080N)	1340	636	636	118
Interests, dividends, etc. (HY090N)	6120	17	17	2000
Interest repayments on mortgage (HY100N)	2020	332	332	127
Income received by people aged < 16 (HY110N)	575	43	43	108
Taxes on wealth (HY120N)	53	3 397	3397	1
Regular inter-household cash transfer paid (HY130N)	637	772	772	53
Tax on income and social contributions (HY140N)	2285	31	2385	60
<b>Gross income components at household level</b>				
Income from rental of a property or land (HY040G)	519	571	583	52
Family related allowances (HY050G)	765	789	840	43
Social exclusion not elsewhere classified (HY060G)	314	461	479	28
Housing allowance (HY070G)	234	2	2	26
Regular inter-household cash transfer received (HY080G)	1340	636	636	118
Interests, dividends, etc. (HY090G)	6570	17	17	1937
Interest repayments on mortgage (HY100G)	2020	332	332	127
Income received by people aged < 16 (HY110G)	575	43	43	108
Taxes on wealth (HY120G)	53	3 397	3397	1
Regular inter-household cash transfer paid (HY130G)	637	772	772	53
Tax on income and social contributions (HY140G)	2285	31	2385	60

**Net income components at personal level**

Employee cash or near cash income (PY010N)	4070	2594	5234	66
Net non-cash employee income (PY020N)	517	707	707	30
Contribution to individual private pension plans (PY035N)	210	286	286	21
Cash benefits or losses from self-employment (PY050N)	7213	698	791	592
Value of goods produced by own-consumption (PY070N)	640	1753	1753	41
Pension from individual private plans (PY080N)	360	2	2	57
Unemployment benefits (PY090N)	982	89	89	199
Old age benefits (PY100N)	2161	3344	3476	24
Survivor's benefits (PY110N)	372	1055	1055	14
Sickness benefits (PY120N)	683	57	57	174
Disability benefits (PY130N)	1102	71	1021	38
Education-related allowances (PY140N)	317	79	79	59

**Gross income components at personal level**

Employee cash or near cash income (PY010G)	5409	2821	5234	94
Net non-cash employee income (PY020G)	517	707	707	30
Contribution to individual private pension plans (PY035G)	210	286	286	21
Cash benefits or losses from self-employment (PY050G)	8051	674	792	635
Value of goods produced by own-consumption (PY070G)	640	1753	1753	41
Pension from individual private plans (PY080G)	360	2	2	57
Unemployment benefits (PY090G)	982	89	89	199
Old age benefits (PY100G)	2161	3344	3476	24
Survivor's benefits (PY110G)	372	1055	1055	14
Sickness benefits (PY120G)	683	57	57	174
Disability benefits (PY130G)	1102	71	1021	38
Education-related allowances (PY140G)	317	79	79	59
Gross monthly earnings for employees (PY200G)	522	3070	3888	8

**Table 10 Mean, total number of observations (before and after imputation) and standard error for income components 2009 (households & persons, weighted mean, cross sectional sample 2009)**

Income components	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Total household gross income (HY010)	13423	1 663	5608	180
Total disposable household income (HY020)	11829	1 596	5608	155
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	11206	1 715	5608	155
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	9367	2485	5608	163
<b>Net income components at household level</b>				
Income from rental of a property or land (HY040N)	1024	757	790	172
Family related allowances (HY050N)	910	929	932	42
Social exclusion not elsewhere classified (HY060N)	468	223	439	25
Housing allowance (HY070N)	267	2	2	164
Regular inter-household cash transfer received (HY080N)	1826	660	715	113
Interests, dividends, etc. (HY090N)	7042	14	14	1322
Interest repayments on mortgage (HY100N)	2476	364	364	129
Income received by people aged < 16 (HY110N)	711	54	54	104
Taxes on wealth (HY120N)	65	4 223	4251	1

Regular inter-household cash transfer paid (HY130N)	707	861	865	45
Tax on income and social contributions (HY140N)	2194	1 139	3310	38
<b><i>Gross income components at household level</i></b>				
Income from rental of a property or land (HY040G)	1103	788	790	193
Family related allowances (HY050G)	910	931	932	42
Social exclusion not elsewhere classified (HY060G)	468	223	439	25
Housing allowance (HY070G)	267	2	2	164
Regular inter-household cash transfer received (HY080G)	1826	660	715	113
Interests, dividends, etc. (HY090G)	7790	14	14	1332
Interest repayments on mortgage (HY100G)	2476	364	364	129
Income received by people aged < 16 (HY110G)	711	54	54	104
Taxes on wealth (HY120G)	65	4 223	4251	1
Regular inter-household cash transfer paid (HY130G)	705	861	865	45
Tax on income and social contributions (HY140G)	2194	1 139	3310	38
<b><i>Net income components at personal level</i></b>				
Employee cash or near cash income (PY010N)	5442	2899	6088	67
Net non-cash employee income (PY020N)	582	947	947	22
Contribution to individual private pension plans (PY035N)	198	323	323	18
Cash benefits or losses from self-employment (PY050N)	8411	544	753	395
Value of goods produced by own-consumption (PY070N)	636	0	1953	27
Pension from individual private plans (PY080N)	1375	0	2	1055
Unemployment benefits (PY090N)	806	111	196	1407
Old age benefits (PY100N)	2752	4220	4238	22
Survivor's benefits (PY110N)	1473	146	165	69
Sickness benefits (PY120N)	403	839	859	29
Disability benefits (PY130N)	1676	844	1012	39
Education-related allowances (PY140N)	355	75	77	48
<b><i>Gross income components at personal level</i></b>				
Employee cash or near cash income (PY010G)	7204	2046	6088	87.9
Net non-cash employee income (PY020G)	582	947	947	22.1
Contribution to individual private pension plans (PY035G)	198	323	323	17.9
Cash benefits or losses from self-employment (PY050G)	9540	536	753	453.6
Value of goods produced by own-consumption (PY070G)	636	0	1953	27.5
Pension from individual private plans (PY080G)	1375	0	2	1054.8
Unemployment benefits (PY090G)	827	109	196	74.8
Old age benefits (PY100G)	2752	4220	4238	22.2
Survivor's benefits (PY110G)	1473	146	165	68.6
Sickness benefits (PY120G)	417	839	859	30.3
Disability benefits (PY130G)	1676	844	1012	39.3
Education-related allowances (PY140G)	355	75	77	48.3
Gross monthly earnings for employees (PY200G)	569	4549	5261	6.3

**Table 11 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, longitudinal component 2006**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	2509	185	198	171
2 household members	2955	31	308	106
3 household members	3388	19	216	106
4 and more	3113	32	327	160
all household members	3021	267	1049	70
Population by age group				
< 25	3020	124	801	138
25 - 34	3314	51	380	141
35 - 44	3291	39	369	205
45 - 54	3450	56	386	138
55 - 64	3082	66	391	103
65 +	2614	122	556	95
Population by sex				
Male	3157	194	1472	87
Female	3045	264	1566	94
all persons	3099	458	3038	84

**Table 12 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, longitudinal component 2007**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	2468	245	369	155
2 household members	3236	268	552	111
3 household members	3766	129	390	128
4 and more	3431	159	626	132
all household members	3270	801	1937	66
Population by age group				
< 25	3189	461	1567	137
25 - 34	3672	215	688	120
35 - 44	3676	215	697	174
45 - 54	3943	222	722	143
55 - 64	3437	297	739	105
65 +	2725	545	1116	62
Population by sex				
Male	3449	903	2802	86
Female	3299	1052	2971	86
all persons	3371	1955	5773	81

**Table 13 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, longitudinal component 2008**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	3025	45	678	108
2 household members	4829	25	1015	226
3 household members	6038	29	649	202
4 and more	5097	38	956	151
all household members	4878	137	3298	95
Population by age group				
< 25	5034	130	2367	152
25 - 34	6276	43	1019	311
35 - 44	5426	37	1079	235
45 - 54	6147	44	1179	206
55 - 64	5333	37	1328	169
65 +	3631	53	1971	72
Population by sex				
Male	5314	157	4516	117
Female	5094	187	4865	125
all persons	5201	344	9381	114

**Table 14 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, longitudinal component 2009**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	3561	310	643	124
2 household members	5591	320	988	180
3 household members	7303	129	621	195
4 and more	6170	146	951	169
all household members	5816	905	3203	93
Population by age group				
< 25	6094	459	2323	171
25 - 34	7225	175	967	229
35 - 44	6262	216	1045	203
45 - 54	7548	211	1139	239
55 - 64	6864	292	1290	228
65 +	4464	687	1996	108
Population by sex				
Male	6394	929	4415	126
Female	6149	1111	4799	126
all persons	6267	2040	9214	113

**Table 15 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, 2006, (cross sectional sample 2006)**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	2 336	787	841	72
2 household members	3 180	129	1 244	73
3 household members	3 556	73	832	90
4 and more	3 032	137	1 357	69
all households	3 057	1 126	4 274	38
Population by age group				
< 25	2 932	507	3 359	58
25 - 34	3 423	218	1 594	85
35 - 44	3 225	165	1 606	76
45 - 54	3 559	272	1 785	88
55 - 64	3 136	580	1 655	88
65 +	2 555	1 937	2 390	37
Population by sex				
Male	3 151	793	5 874	48
Female	3 039	1144	6 515	44
all persons	3 094	1937	12 389	44

**Table 16 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, 2007, ((cross sectional sample 2007)**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	2499	592	823	114
2 household members	3238	559	1161	79
3 household members	3968	264	800	124
4 and more	3346	316	1297	104
all household members	3273	1731	4109	54
Population by age group				
< 25	3144	950	3148	97
25 - 34	3689	425	1458	101
35 - 44	3604	420	1529	141
45 - 54	3801	479	1715	99
55 - 64	3419	610	1629	85
65 +	2741	1176	2347	46
Population by sex				
Male	3407	1862	5675	66
Female	3282	2198	6151	69
all persons	3342	4060	11826	64

**Table 17 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, 2008, ((cross sectional sample 2008))**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	3239	63	932	104
2 household members	4880	35	1349	148
3 household members	6384	18	836	245
4 and more	5318	42	1224	162
all household members	5060	158	4341	90
Population by age group				
< 25	5131	141	3091	156
25 - 34	6113	44	1407	217
35 - 44	5599	39	1532	188
45 - 54	6253	59	1728	242
55 - 64	5401	57	1842	142
65 +	3676	66	2585	64
Population by sex				
Male	5438	195	5841	124
Female	5140	211	6344	110
all persons	5284	406	12185	111

**Table 18 Mean, number of observations and standard error for the equivalised disposable income breakdown by sex, age groups and household size, 2009, ((cross sectional sample 2009))**

Equivalised disposable income	Mean	Number of observations		Standard error
		Before imputation	After imputation	
Subclasses by household size				
1 household member	4091	605	1313	126
2 household members	6024	555	1784	133
3 household members	7813	213	1025	190
4 and more	6418	223	1461	122
all household members	6168	1596	5583	74
Population by age group				
< 25	6308	688	3498	127
25 - 34	7462	299	1659	163
35 - 44	6555	354	1915	142
45 - 54	7450	408	2174	162
55 - 64	6770	520	2429	150
65 +	4455	1112	3298	71
Population by sex				
Male	6552	1528	7154	89
Female	6281	1853	7819	88
all persons	6412	3381	14973	83

## **2.3. Non-sampling errors**

### **2.3.1. Sampling frame and coverage errors**

EU-SILC in Bulgaria is carried out applying the two-stage stratified sampling with PSU (census enumerated units) and the final unit - household. The samples for EU-SILC 2006, 2007, 2008 and 2009 are selected from the sampling frame based on the 2001 Population census data base. The data base includes all private households and their current members residing in the country. Persons living in collective households and in institutions are excluded from the target population. Student's and worker's hostels are excluded at the first stage of selection of PSU, because student's and worker's households rarely stay on the same addresses and are difficult to trace.

The frame is regularly updated according only to the administrative changes made.

Addresses and household data within the selected PSUs are updated according to the Information System "Demography" data (ISD). Elaboration of the ISD started in 2005 and it is used officially since 2007. This system includes data from 1992 and 2001 Population and housing censuses and from the current demographic statistics since 1995 up to now. Data source for the natural movement and the internal migration of the population is the National Civil Registration System.

The longitudinal component consist of the sub-samples 1, 2 and 4.

### **2.3.2. Measurement and processing errors**

#### **2.3.2.1. Measurement errors**

As with any other statistical survey, EU-SILC may be burdened with non-sampling errors which occur at various stages of the survey and which cannot be eliminated completely. This mainly applies to interviewers' errors at the stage of collecting the information, errors due to the respondents' misunderstanding of questions and inaccurate or sometimes even false answers as well as the errors taking place at the stage of data recording.

The questionnaire for EU-SILC 2009 was developed on the basis of the Commission Regulation (EC) 362/2008, EU-SILC065 (2009 operation) and LC-ILC-DEPRIV 17/08/EN REV– Description of secondary target variables and corresponding questionnaire: EU-SILC 2009 Module.

In order to finalize the questionnaires, any observations made on the questionnaires of the previous years were taken into account. It should also be pointed out that, in our opinion, the quality of data concerning net income categories is much higher than that concerning gross income. The reason for this is that the information on taxes and social and health insurance contributions were affected by the non-response to the highest degree.

EU-SILC survey in 2009 was carried out in April/July. EU-SILC is a non-obligatory, representative survey of individual households, performed by a face-to-face interview technique with the use of the PAPI method. Two types of questionnaires: individual and household questionnaire were applicable. The fieldwork and all project implementation activities were done by NSI with annual grants from EC.

The training ship for interviewers was held on 6 – 9 April 2009. All responsible persons (supervisors) for the survey from each regional statistical office, interviewers and persons responsible for methodology from NSI took part in it. Household's registries and person's ID were marked with special attention. The training program included methodology, specific areas of income variables and variable from the new module 2009, which were presented to the participants. A discussion was held with the participants of the seminar related to the problems in collecting data and specific questions which required legislation knowledge. At the end of the course different examples of households and income sources were presented to the attendants and the training was evaluated.

Some of the households declared high income values; they confessed that their social insurance contribution is made at a lower amount. The data collected from the survey were compared to the data obtained from the registers. Some of the persons, who according to the register receive minimum incomes, defined themselves as unemployed or non-active in the survey, because they assess their current activity as temporary and did not indicate their income.

Changes occurring in persons' activity status longitudinally resulted in a number of inconsistencies. For example, persons having been working in year N-1 but retired in year N, persons being students in year N-1 and employed in year N, income in year N-1 from persons who died in year N, etc. may result in inconsistencies representing though reality. In any case the pre-mentioned examples resulted both in under and over reporting of income.

Income from interests, dividends in unincorporated businesses is in general not provided from the households. There is a sense that self-employment income has still been under-estimated.

### **2.3.2.2. Processing errors**

#### *Data-entry phase*

EU-SILC data were collected with two kinds of paper questionnaires – household and individual questionnaires. The data entry program was developed in Blaise and both questionnaires were incorporated into one Blaise form.

A large number of edit checks (hard and soft) between questions in both questionnaires were implemented for ensuring data correctness and consistency. For example, two external files (at household and personal level) were used for verifying correctness of identifiers and for checking against previously collected information – household composition and questions such as day, month and year of birth, sex etc. for those individuals who are not observed for the first time. All gross income values were checked if they are equal or greater than net values (hard error) and if net values are greater or equal than gross values divided by two (soft error). For checking purposes, lower and upper boundaries, narrower than absolute, were set for most of the questions on income (e.g. social benefits, pensions) based upon national legislation. External files that hold valid ISCO-88 and NACE codes and descriptions were included.

During data entry phase, data entry operators were enabled to generate progress report by using a manipula program. The report contained form IDs, form status, number of errors and number of suppressed signals.

#### *Data processing phase*

After data-entry phase, further data checking and editing was performed by SILC unit, using manipula programs and SPSS scripts.

Initially, data were checked whether all questionnaires have been entered and completed. Special attention was paid to split-off households. Next, all suppressed signals and remarks made by data entry operators were checked up and corrections were made if necessary. After that, data were converted to SPSS data sets. Extreme income values were compared with data provided by National Social Security Institute or administrative data sources and data from previous waves where possible and corrected if necessary. All SILC target variables were computed after checking original variable(s). Finally, four transmission files were converted to .csv format and verified by Eurostat` SAS checking programs.

The rates of failed edits for income variables are not available.

### 2.3.3. Non-response errors

#### 2.3.3.1. Achieved sample size

**Table 19 Sample size and accepted interviews**

	2006	2007	2008	2009
Accepted household interviews (DB135=1)	1058	1968	3298	3210
Personal Interview accepted (RB250=11)				
Number of persons 16 years and older	2532	4834	7827	7776
Sample Persons	2532	4779	7648	7416
Co-residents	0	55	179	360

#### 2.3.3.2. Unit non-response

- **wave 1 = 2006 (subsamples 4):**

- *Household non-response rates*  $NRh = [1 - (Ra * Rh)] * 100$ ,  
where

$$Ra = 0.947$$

$$Rh = 0.732$$

$$NRh = 30.67\%$$

- *Individual non-response rates*  $NRp = (1 - Rp) * 100$ ,

$$Rp = 0.972$$

$$NRp = 2.84\%$$

- *Overall individual non-response rates*  $*NRp = [1 - (Ra * Rh * Rp)] * 100$ ,

$$*NRp = 32.643\%;$$

**Table 20 Household response rates: Comparison of results codes between wave 2 and wave 1**

		Sample outcome in wave 2 = 2007 (R4)											
		DB130 = 11											
		DB135 = 1	DB135 = 2	DB120 = 22	DB130 = 22	DB130 = 23	DB130 = 24	DB130 = 21	DB120 = 21	NC	DB110 = 10	DB120 = 23	Total
Sample outcome in wave 1													
DB130 = 11	DB135 = 1	929	2	0	23	19	6	58	0	5	0	0	1042
	DB135 = 2		0										0
DB120 = 21													
DB120 = 22													
DB120 = 23													
DB130 = 21													
DB130 = 22													
DB130 = 23													
DB130 = 24													
	total	929	2	0	23	19	6	58	0	5	0	0	1042
New household in wave 2													
DB110 = 8		6											6
DB110 = 9		0											0
		935	2	0	23	19	6	58	0	5	0	0	1048

- Wave response rate = 0.892
- Refusal rate = 0.055
- No-contacted and others = 0.030
- Longitudinal follow-up rate = 0.940
- Follow-up rate = 0.945
- Achieved sample size ratio = 0.897

**Table 21 Household response rates: Comparison of results codes between wave 3 and wave 2**

**Sample outcome in wave 3 = 2008 (R1 and R4)**

		DB130 = 11										Total	
		DB135 = 1	DB135 = 2	DB120 = 22	DB130 = 22	DB130 = 23	DB130 = 24	DB130 = 21	DB120 = 21	NC	DB110 = 10		DB120 = 23
Sample outcome in wave 2													
DB130 = 11	DB135 = 1	1968	3	50	126	99	37	248	32	37	4	4	2608
	DB135 = 2		0										0
DB120 = 21													
DB120 = 22													
DB120 = 23													
DB130 = 21													
DB130 = 22													
DB130 = 23													
DB130 = 24													
total		1968	3	50	126	99	37	248	32	37	4	4	2608
New household in wave 3													
DB110 = 8		65		0	2	3	2	1	34				107
DB110 = 9		0	0	0	0	0	0	0	0	0		0	0
		2033	3	50	128	102	39	249	66	37	4	4	2715

- Wave response rate = 0.750
- Refusal rate = 0.092
- No-contacted and others = 0.107
- Longitudinal follow-up rate = 0.875
- Follow-up rate = 0.903
- Achieved sample size ratio = 0.780

**Table 22 Household response rates: Comparison of results codes between wave 4 and wave 3**

		Sample outcome in wave 4 = 2009 (R1 and R2 and R4)										Total	
		DB130 = 11											
		DB135 = 1	DB135 = 2	DB120 = 22	DB130 = 22	DB130 = 23	DB130 = 24	DB130 = 21	DB120 = 21	NC	DB110 = 10	DB120 = 23	
Sample outcome in wave 2													
DB130 = 11	DB135 = 1	3298	2	183	396	191	166	542	62	31	1	13	4885
	DB135 = 2	0	0										0
DB120 = 21													
DB120 = 22													
DB120 = 23													
DB130 = 21													
DB130 = 22													
DB130 = 23													
DB130 = 24													
total		3298	2	183	396	191	166	542	62	31	1	13	4885
New household in wave 3													
DB110 = 8		35		0	0	0	0	0	0				35
DB110 = 9		0	0	0	0	0	0	0	0		0	0	0
		3333	2	183	396	191	166	542	62	31	1	13	4920

- Wave response rate = 0.679
- Refusal rate = 0.110
- No-contacted and others = 0.165
- Longitudinal follow-up rate = 0.867
- Follow-up rate = 0.874
- Achieved sample size ratio = 0.682

**Table 23. Personal interview response rate**

**Personal interview outcome in wave 2=2007 (R4)**

	RB250=11,12,13	Not completed because of								Total	
		RB250=21	RB250=22	RB250=23	RB250=31	RB250=32	RB250=33	HHnc	Pn		Pl
sample persons (RB100=1 and RB245=1,2,3) from the sample forwarded from last wave (t-1)											
RB110=1,2	2243	0	0	7	13	13	3				2279
RB110=6											17
RB110=4 or -1											14
RB120=2											0
RB120=3											19
RB120=4											0
DB135=2 or -1, or DB110=7, or DB120=21- 23 or -1, or DB130=21- 24 or -1											
DB110= 3-6											
<b>New sample persons</b>											0
Reached age 16	33				2	1					36
Sample additions											0
<b>Non-sample persons 16+</b>											0
from wave 2=2007	55			2	0	1					58
from wave 1=2006	0										0
Sample persons from sample not forwarded from last wave t-1=2006 (excluded died or not eligible according to the tracing rules)											
											37
1+3+6+7+9+10	2276	0	0	7	15	14	3	0	0	0	2329
1+3+6+7+9+10+13	2276	0	0	7	15	14	3	0	0	0	2366
1+3+6+7+9+10+11	2331	0	0	9	15	15	3	0	0	0	2387

• **Response rate for persons**

Wave response rate of sample persons = 0.983

Wave response rate of co-residents = 0.948

Longitudinal follow-up rate = 0.968

R (RB250=21) = 0.000

R (RB250=23) = 0.003

R (RB250=31) = 0.006

R (RB250=32) = 0.006

R (RB250=33) = 0.001

achieved sample size ratio for sample persons = 0.886

achieved sample size ratio for sample persons and co-residents = 0.908

achieved sample size ratio for co-residents selected the first wave = 0.000

response rate for non-sample persons = 0.917

**Table 24. Personal interview response rate**

**Personal interview outcome in wave 3=2008 (R1 and R4)**

row	sample persons (RB100=1 and RB245=1,2,3) from the sample forwarded from last wave (t-1)	Not completed because of								Total		
		RB250=11,12,13	RB250=21	RB250=22	RB250=23	RB250=31	RB250=32	RB250=33	HHnc		Pn	Pl
1	RB110=1,2	3924	0	0	13	13	3	2				3955
2	RB110=6											56
3	RB110=4 or -1											36
4	RB120=2											2
5	RB120=3											76
6	RB120=4											0
7	DB135=2 or -1, or DB110=7, or DB120=21- 23 or -1, or DB130=21- 24 or -1											2
8	DB110= 3-6											
	<b>New sample persons</b>											0
9	Reached age 16	61			1	1						63
10	Sample additions											0
	<b>Non-sample persons 16+</b>											0
11	from wave 3=2008	179			0	1	1					181
12	from wave 2=2007											
13	<b>Sample persons from sample not forwarded from last wave t-1 (excluded died or not eligible according to the tracing rules)</b>											
												57
	1+3+6+7+9+10	3985	0	0	14	14	3	2	0	0	0	4056
	1+3+6+7+9+10+13	3985	0	0	14	14	3	2	0	0	0	4113
	1+3+6+7+9+10+11	4164	0	0	14	15	4	2	0	0	0	4237

• **Response rate for persons**

Wave response rate of sample persons = 0.982

Wave response rate of co-residents = 0.989

Longitudinal follow-up rate =0.969

R (RB250=21) = 0.000

R (RB250=23) = 0.003

R (RB250=31) = 0.003

R (RB250=32) = 0.001

R (RB250=33) = 0.000

achieved sample size ratio for sample persons = 0.821

achieved sample size ratio for sample persons and co-residents = 0.849

achieved sample size ratio for co-residents selected the first wave = 3.25

response rate for non-sample persons = 0.968

**Table 25. Personal interview response rate**

**Personal interview outcome in wave 4=2009 (R1 and R2 and R4)**

	RB250=11,12,13	Not completed because of								Total	
		RB250=21	RB250=22	RB250=23	RB250=31	RB250=32	RB250=33	HHnc	Pn		Pl
sample persons (RB100=1 and RB245=1,2,3) from the sample forwarded from last wave (t-1)											
RB110=1,2	7413	0	0	11	16	0	2				7442
RB110=6											87
RB110=4 or -1											40
RB120=2											2
RB120=3											45
RB120=4											11
DB135=2 or -1, or DB110=7, or DB120=21- 23 or -1, or DB130=21- 24 or -1											0
DB110= 3-6											
<b>New sample persons</b>											0
Reached age 16	107										107
Sample additions											0
<b>Non-sample persons 16+</b>											0
from wave 3=2008	360				1						361
from wave 2=2007											0
Sample persons from sample not forwarded from last wave t-1 (excluded died or not eligible according to the tracing rules)											
											97
1+3+6+7+9+10	7520	0	0	11	16	0	2	0	0	0	7600
1+3+6+7+9+10+13	7520	0	0	11	16	0	2	0	0	0	7697
1+3+6+7+9+10+11	7880	0	0	11	17	0	2	0	0	0	7961

• **Response rate for persons**

Wave response rate of sample persons = 0.989

Wave response rate of co-residents = 0.997

Longitudinal follow-up rate = 0.977

R (RB250=21) = 0.000

R (RB250=23) = 0.001

R (RB250=31) = 0.002

R (RB250=32) = 0.000

R (RB250=33) = 0.000

achieved sample size ratio for sample persons = 0.970

achieved sample size ratio for sample persons and co-residents = 0.993

achieved sample size ratio for co-residents selected the first wave = 0.497

response rate for non-sample persons = 1.000

**2.3.3.3. Distribution of households by ‘household status’ (DB110), by ‘record of contact at address’ (DB120), by ‘household questionnaire result’ (DB130) and by ‘household interview acceptance’ (DB135)**

**Table 26 Distribution of households by household status**

	total	DB110=1	DB110=2	DB110=3	DB110=4	DB110=5	DB110=6	DB110=7	DB110=8	DB110=9	DB110=10	DB110=11
<b>wave 2=2007</b>												
<b>RG1</b>												
total	1530	0	0	0	0	0	0	0	0	1530	0	0
%	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0
<b>RG4</b>												
total	1064	1022	9	0	2	3	0	0	6	0	0	22
%	100.0	96.1	0.8	0.0	0.2	0.3	0.0	0.0	0.6	0.0	0.0	2.1
<b>wave 3 =2008</b>												
<b>RG1</b>												
total	1075	961	7	2	9	5	0	0	36	0	0	55
%	100.0	89.4	0.7	0.2	0.8	0.5	0.0	0.0	3.3	0.0	0.0	5.1
<b>RG2</b>												
total	2935	0	0	0	0	0	0	0	0	2935	0	0
%	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0
<b>RG4</b>												
total	958	879	6	0	8	12	1	0	29	0	4	19
%	100.0	91.8	0.6	0.0	0.8	1.3	0.1	0.0	3.0	0.0	0.4	2.0
<b>wave 4=2009</b>												
<b>RG1</b>												
total	854	826	3	0	1	7	0	1	13	0	0	3
%	100.0	96.7	0.4	0.0	0.1	0.8	0.0	0.1	1.5	0.0	0.0	0.4
<b>RG2</b>												
total	1691	1655	8	1	2	11	0	0	9	0	0	5
%	100.0	97.9	0.5	0.1	0.1	0.7	0.0	0.0	0.5	0.0	0.0	0.3
<b>RG4</b>												
total	788	762	2	0	1	7	0	0	13	0	1	2
%	100.0	96.7	0.3	0.0	0.1	0.9	0.0	0.0	1.6	0.0	0.1	0.3

**Table 27 Distribution of households by contact at address**

		total	DB120=11	DB120=21	DB120=22	DB120=23
<b>wave 2=2007</b>						
<b>RG1</b>	total	1530	1444	32	50	4
	%	100.0	94.4	2.1	3.3	0.3
<b>RG4</b>	total	15	15	0	0	0
	%	100.0	100.0	0.0	0.0	0.0
<b>wave 3 =2008</b>						
<b>RG1</b>	total	43	24	19	0	0
	%	100.0	55.8	44.2	0.0	0.0
<b>RG2</b>	total	2935	2711	28	183	13
	%	100.0	92.4	1.0	6.2	0.4
<b>RG4</b>	total	35	20	15	0	0
	%	100.0	57.1	42.9	0.0	0.0
<b>wave 4=2009</b>						
<b>RG1</b>	total	16	16	0	0	0
	%	100.0	100.0	0.0	0.0	0.0
<b>RG2</b>	total	17	17	0	0	0
	%	100.0	100.0	0.0	0.0	0.0
<b>RG4</b>	total	15	15	0	0	0
	%	100.0	100.0	0.0	0.0	0.0

**Table 28 Distribution of households by household questionnaire result**

		total	DB130=11	DB130=21	DB130=22	DB130=23	DB130=24
<b>wave 2=2007</b>							
<b>RG1</b>	total	1444	1040	190	103	80	31
	%	100.0	72.0	13.2	7.1	5.5	2.1
<b>RG4</b>	total	1037	931	58	23	19	6
	%	100.0	89.8	5.6	2.2	1.8	0.6
<b>wave 3 =2008</b>							
<b>RG1</b>	total	985	842	70	44	21	8.0
	%	100.0	85.5	7.1	4.5	2.1	0.8
<b>RG2</b>	total	2711	1683	414	308	154	152
	%	100.0	62.1	15.3	11.4	5.7	5.6
<b>RG4</b>	total	899	775	58	44	16.0	6.0
	%	100.0	86.2	6.5	4.9	1.8	0.7
<b>wave 4=2009</b>							
<b>RG1</b>	total	842	826	5	3	2	6.0
	%	100.0	98.1	0.6	0.4	0.2	0.7
<b>RG2</b>	total	1672	1626	23	16	4.0	3
	%	100.0	97.2	1.4	1.0	0.2	0.2
<b>RG4</b>	total	777	760	3	11	0.0	3.0
	%	100.0	97.8	0.4	1.4	0.0	0.4

**Table 29 Distribution of households by household interview acceptance**

		total	DB135=1	DB135=2
<b>wave 2=2007</b>				
<b>RG1</b>	total	1040	1039	1
	%	100.0	99.9	0.1
<b>RG4</b>	total	931	929	2
	%	100.0	89.8	5.6
<b>wave 3 =2008</b>				
<b>RG1</b>	total	842	841	1
	%	100.0	99.9	0.1
<b>RG2</b>	total	1683	1682	1
	%	100.0	99.9	0.1
<b>RG4</b>	total	775	775	0
	%	100.0	100.0	0.0
<b>wave 4=2009</b>				
<b>RG1</b>	total	826	826	0
	%	100.0	100.0	0.0
<b>RG2</b>	total	1626	1625	1
	%	100.0	99.9	0.1
<b>RG4</b>	total	760	759	1
	%	100.0	99.9	0.1

**2.3.3.4. Distribution of persons for membership status (RB110)**

**Table 30 Distribution of persons by membership status**

		total	Current household members				Not current household members		
			RB110=1	RB110=2	RB110=3	RB110=4	RB110=5	RB110=6	RB110=7
<b>wave 2=2007</b>									
<b>RG1</b>	total	3080	3080	0	0	0	0	0	0
	%	100.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>RG4</b>	total	2808	2626	17	74	14	60	17	0
	%	100.0	93.5	0.6	2.6	0.5	2.1	0.6	0.0
<b>wave 3 =2008</b>									
<b>RG1</b>	total	2698	2405	25	111	19	104	34	0
	%	100.0	89.1	0.9	4.1	0.7	3.9	1.3	0.0
<b>RG2</b>	total	4259	4259	0	0	0	0	0	0
	%	100.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>RG4</b>	total	2424	2202	34	67	17	82	22	0
	%	100.0	90.8	1.4	2.8	0.7	3.4	0.9	0.0
<b>wave 4=2009</b>									
<b>RG1</b>	total	2658	2430	32	98	15	58	25	0
	%	100.0	91.4	1.2	3.7	0.6	2.2	0.9	0.0
<b>RG2</b>	total	4212	4016	23.0	77.0	11.0	46.0	38.0	1
	%	100.0	95.3	0.5	1.8	0.3	1.1	0.9	0.0
<b>RG4</b>	total	2366	2207	20	52	14	48	24	1
	%	100.0	93.3	0.8	2.2	0.6	2.0	1.0	0.0

**Table 31 Distribution of persons moving out by variable RB120**

		total		RB110 = 5			
				RB120 = 1		RB120 = 2	RB120 = 3
		this person is a current household member of a household this wave	this person is not a current household member				
<b>wave 2=2007</b>							
<b>RG4</b>	total	60	41		0	19	0
	%	100.0	68.3		0.0	31.7	0.0
<b>wave 3 =2008</b>							
<b>RG1</b>	total	104	60		1	43	0
	%	100.0	57.7		1.0	41.3	0.0
<b>RG4</b>	total	82	48		1	33	0
	%	100.0	58.5		1.2	40.2	0.0
<b>wave 4=2009</b>							
<b>RG1</b>	total	58	38		0	18	2
	%	100	65.5		0.0	31.1	3.4
<b>RG2</b>	total	46	33		1	7	5
	%	100	71.7		2.2	15.2	10.9
<b>RG4</b>	total	48	23		1	20	4
	%	100	47.9		2.1	41.7	8.3

**2.3.3.5. Item non-response**

**Table 32 Information on item non-response on household level - households 2006, longitudinal component 2006**

Item non-response	households having received an amount		Full information		Partial information		Missing information	
	total	% of all interviewed households	total	%	total	%	total	%
Total household gross income (HY010)	1058	100	693	65.5	355	33.6	10	0.9
Total disposable household income (HY020)	1058	100	267	25.2	755	71.4	36	3.4
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	1056	99.8	276	26.1	682	64.6	98	9.3
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	938	88.7	433	46.2	442	47.1	63	6.7

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<b>Net income components at household level</b>						
Income from rental of a property or land (HY040N)	186	17.6	186	100		
Family related allowances (HY050N)	284	26.8	284	100		
Social exclusion not elsewhere classified (HY060N)	244	23.1	194	79.5	50	20.5
Housing allowance (HY070N)	1	0.1	1	100		
Regular inter-household cash transfer received (HY080N)	83	7.8	83	100.0		
Interests, dividends, etc. (HY090N)	1	0.1	1	100		
Interest repayments on mortgage (HY100N)	32	3	32	100		
Income received by people aged < 16 (HY110N)	13	1.2	13	100		
Taxes on wealth (HY120N)	905	85.5	843	93.1	62	6.9
Regular inter-household cash transfer paid (HY130N)	37	3.5	37	100		
Tax on income and social contributions (HY140N)	586	55.4	586	100		

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<b>Gross income components at household level</b>						
Income from rental of a property or land (HY040G)	186	17.6	186	100		
Family related allowances (HY050G)	284	26.8	284	100		
Social exclusion not elsewhere classified (HY060G)	244	23.1	194	79.5	50	20.5
Housing allowance (HY070G)	1	0.1	1	100		
Regular inter-household cash transfer received (HY080G)	83	7.8	83	100.0		
Interests, dividends, etc. (HY090G)	1	0.1	1	100		
Interest repayments on mortgage (HY100G)	32	3	32	100		
Income received by people aged < 16 (HY110G)	13	1.2	13	100		
Taxes on wealth (HY120G)	905	85.5	843	93.1	62	6.9
Regular inter-household cash transfer paid (HY130G)	37	3.5	37	100		
Tax on income and social contributions (HY140G)	586	55.4	586	100		

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**Table 33 Information on item non-response on household level - households 2007, longitudinal component 2007**

Item non-response	households having received an amount		Full information		Partial information		Missing information	
	total	% of all interviewed households	total	%	total	%	total	%
Total household gross income (HY010)	1963	99.75	801	40.8	1122	57.2	40	2.0
Total disposable household income (HY020)	1963	99.75	801	40.8	1159	59.0	3	0.2
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	1943	98.73	698	35.9	1239	63.8	6	0.3
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	1879	95.48	359	19.1	1047	55.7	473	25.2
<b>Net income components at household level</b>								
Income from rental of a property or land (HY040N)	279	14.2	179	100				
Family related allowances (HY050N)	401	20.4	401	100				
Social exclusion not elsewhere classified (HY060N)	317	16.1	317	100				
Housing allowance (HY070)	1	0.1	1	100				
Regular inter-household cash transfer received (HY080)	184	9.3	184	100				
Interests, dividends, etc. (HY090N)	11	0.6	11	100				
Interest repayments on mortgage (HY100N)	42	2.1	42	100				
Income received by people aged < 16 (HY110)	12	0.6	12	100				
Taxes on wealth (HY120N)	1630	82.8	1630	100				
Regular inter-household cash transfer paid (HY130N)	115	5.8	115	100				
Tax on income and social contributions (HY140N)	1130	57.4	1130	100				
<b>Gross income components at household level</b>								
Income from rental of a property or land (HY040G)	279	14.2	279	100				
Family related allowances (HY050G)	401	20.4	401	100				
Social exclusion not elsewhere classified (HY060G)	317	16.1	317	100				
Housing allowance (HY070G)	1	0.1	1	100				
Regular inter-household cash transfer received (HY080G)	184	9.3	184	100				
Interests, dividends, etc. (HY090G)	11	0.6	11	100				
Interest repayments on mortgage (HY100G)	42	2.1	42	100				
Income received by people aged < 16 (HY110G)	12	0.6	12	100				
Taxes on wealth (HY120G)	1630	82.8	1630	100				
Regular inter-household cash transfer paid (HY130G)	115	5.8	115	100				
Tax on income and social contributions (HY140G)	1130	57.4	1130	100				

**Table 34 Information on item non-response on household level - households 2008, longitudinal component 2008**

Item non-response	households having received an amount		Full information		Partial information		Missing information	
	total	% of all interviewed households	total	%	total	%	total	%
Total household gross income (HY010)	3295	99.9	550	16.7	2665	80.9	80	2.4
Total disposable household income (HY020)	3295	99.9	126	3.8	3168	96.1	1	0.0
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	3269	99.1	1151	35.2	2115	64.7	3	0.1
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	3148	95.5	1034	32.8	2111	67.1	3	0.1
<b>Net income components at household level</b>								
Income from rental of a property or land (HY040N)	463	14.0	450	97.2	2	0.4	11	2.4
Family related allowances (HY050N)	621	18.8	580	93.4	41	6.6		
Social exclusion not elsewhere classified (HY060N)	338	10.2	328	97.0	10	3.0		
Housing allowance (HY070)	2	0.1	2	100.0				
Regular inter-household cash transfer received (HY080)	457	13.9	457	100.0				
Interests, dividends, etc. (HY090N)	13	0.4	13	100.0				
Interest repayments on mortgage (HY100N)	239	7.2	239	100.0				
Income received by people aged < 16 (HY110)	34	1.0	34	100.0				
Taxes on wealth (HY120N)	2564	77.7	2564	100.0				
Regular inter-household cash transfer paid (HY130N)	584	17.7	584	100.0				
Tax on income and social contributions (HY140N)	1828	55.4	32	1.8	1786	97.7	10	0.5
<b>Gross income components at household level</b>								
Income from rental of a property or land (HY040G)	463	14.0	451	97.4	8	1.7	4	0.9
Family related allowances (HY050G)	621	18.8	580	93.4	41	6.6		
Social exclusion not elsewhere classified (HY060G)	338	10.2	328	97.0	10	3.0		
Housing allowance (HY070G)	2	0.1	2	100.0				
Regular inter-household cash transfer received (HY080G)	457	13.9	457	100.0				
Interests, dividends, etc. (HY090G)	13	0.4	13	100.0				
Interest repayments on mortgage (HY100G)	239	7.2	239	100.0				
Income received by people aged < 16 (HY110G)	34	1.0	34	100.0				
Taxes on wealth (HY120G)	2564	77.7	2564	100.0				
Regular inter-household cash transfer paid (HY130G)	584	17.7	584	100.0				
Tax on income and social contributions (HY140G)	1828	55.4	32	1.8	1786	97.7	10	0.5

**Table 35 Information on item non-response on household level - households 2009, longitudinal component 2009**

Item non-response	households having received an amount		Full information		Partial information		Missing information	
	total	% of all interviewed households	total	%	total	%	total	%
Total household gross income (HY010)	3207	99.9	943	29.4	2181	68.0	83	2.6
Total disposable household income (HY020)	3207	99.9	905	28.2	2270	70.8	32	1.0
Total disposable household income before social transfers except old-age and survivor's benefits (HY022)	3192	99.4	987	30.9	2126	66.6	79	2.5
Total disposable household income before social transfers including old-age and survivor's benefit (HY023)	3042	94.8	1393	45.8	1529	50.3	120	3.9
<b>Net income components at household level</b>								
Income from rental of a property or land (HY040N)	457	14.2	437	95.6	20	4.4		
Family related allowances (HY050N)	609	19.0	608	99.8			1	0.2
Social exclusion not elsewhere classified (HY060N)	264	8.2	128	48.5	135	51.1	1	0.4
Housing allowance (HY070)	0							
Regular inter-household cash transfer received (HY080)	408	12.7	386	94.6	2	0.5	20	4.9
Interests, dividends, etc. (HY090N)	8	0.2	8	100.0				
Interest repayments on mortgage (HY100N)	203	6.3	203	100.0				
Income received by people aged < 16 (HY110)	29	0.9	29	100.0				
Taxes on wealth (HY120N)	2724	75.6	2417	88.7			10	0.4
Regular inter-household cash transfer paid (HY130N)	508	15.8	507	99.8	1	0.2		
Tax on income and social contributions (HY140N)	1885	58.7	600	31.8	923	49.0	362	19.2
<b>Gross income components at household level</b>								
Income from rental of a property or land (HY040G)	457	14.2	457	100.0				
Family related allowances (HY050G)	609	19.0	608	99.8			1	0.2
Social exclusion not elsewhere classified (HY060G)	264	8.2	128	48.5	135	51.1	1	0.4
Housing allowance (HY070G)	0							
Regular inter-household cash transfer received (HY080G)	408	12.7	386	94.6	2	0.5	20	4.9
Interests, dividends, etc. (HY090G)	8	0.2	8	100.0				
Interest repayments on mortgage (HY100G)	203	6.3	203	100.0				
Income received by people aged < 16 (HY110G)	29	0.9	29	100.0				
Taxes on wealth (HY120G)	2724	75.6	2417	88.7			10	0.4
Regular inter-household cash transfer paid (HY130G)	508	15.8	507	99.8	1	0.2		
Tax on income and social contributions (HY140G)	1885	58.7	600	31.8	923	49.0	362	19.2

**Table 36 Information on item non-response on individual level - persons 2006, longitudinal component 2006**

Item non-response	persons having received an amount		Full information		Partial information		Missing information	
	total	%	total	%	total	%	total	%
<b>Net income component at personal level</b>								
Employee cash or near cash income (PY010N)	1073	42.38	769	71.7	255	23.8	49	4.6
Net non-cash employee income (PY020N)	41	1.6	41	100				
Cash benefits or losses from self-employment (PY050N)	217	8.6	175	80.6	28	12.9	14	6.5
Value of goods produced by own-consumption (PY070N)	340	13.4	340	100				
Pension from individual private plans (PY080N)	0							
Unemployment benefits (PY090N)	35	1.4	35	100				
Old age benefits (PY100N)	859	33.9	851	99.1			8	0.9
Survivor's benefits (PY110N)	70	2.8	70	100.0				
Sickness benefits (PY120N)	18	0.7	18	100				
Disability benefits (PY130N)	95	3.8	92	96.8			3	3.2
Education-related allowances (PY140N)	46	1.8	46	100				
<b>Gross income components at personal level</b>								
Employee cash or near cash income (PY010G)	1073	42.38	672	62.6	352	32.8	49	4.6
Net non-cash employee income (PY020G)	41	1.6	41	100				
Cash benefits or losses from self-employment (PY050G)	217	8.6	181	83.4	23	10.6	13	6.0
Value of goods produced by own-consumption (PY070G)	340	13.4	340	100				
Pension from individual private plans (PY080G)	0							
Unemployment benefits (PY090G)	35	1.4	35	100				
Old age benefits (PY100G)	859	33.9	851	99.1			8	0.9
Survivor's benefits (PY110G)	70	2.8	70	100.0				
Sickness benefits (PY120G)	18	0.7	18	100				
Disability benefits (PY130G)	95	3.8	92	96.8			3	3.2
Education-related allowances (PY140G)	46	1.8	46	100				

**Table 37 Information on item non-response on individual level - persons 2007, longitudinal component 2007**

Item non-response	persons having received an amount		Full information		Partial information		Missing information	
	total	%	total	%	total	%	total	%
<b>Net income component at personal level</b>								
Employee cash or near cash income (PY010N)	2020	41.79	1165	57.7	728	36.0	127	6.3
Net non-cash employee income (PY020N)	331	6.8	331	100				
Contribution to individual private pension plans (PY035N)	93	1.9	93	100				
Cash benefits or losses from self-employment (PY050N)	672	13.9	565	84.1	60	8.9	47	7.0

Value of goods produced by own-consumption (PY070N)	677	14.0	677	100				
Pension from individual private plans (PY080N)	0							
Unemployment benefits (PY090N)	36	0.7	36	100				
Old age benefits (PY100N)	1609	33.3	1549	96.3			60	3.7
Survivor's benefits (PY110N)	28	0.6	28	100.0				
Sickness benefits (PY120N)	44	0.9	44	100				
Disability benefits (PY130N)	216	4.5	216	100.0				
Education-related allowances (PY140N)	2	0	2	100				
<b>Gross income components at personal level</b>								
Employee cash or near cash income (PY010G)	2020	41.79	863	42.7	1031	51.0	126	6.2
Net non-cash employee income (PY020G)	331	6.8	331	100				
Contribution to individual private pension plans (PY035G)	93	1.9	93	100				
Cash benefits or losses from self-employment (PY050G)	672	13.9	555	82.6	99	14.7	18	2.7
Value of goods produced by own-consumption (PY070G)	677	14.0	677	100				
Pension from individual private plans (PY080G)	0							
Unemployment benefits (PY090G)	36	0.7	36	100				
Old age benefits (PY100G)	1609	33.3	1549	96.3			60	3.7
Survivor's benefits (PY110G)	28	0.6	28	100.0				
Sickness benefits (PY120G)	44	0.9	44	100				
Disability benefits (PY130G)	216	4.5	216	100.0				
Education-related allowances (PY140G)	2	0	2	100				

**Table 38 Information on item non-response on individual level - persons 2008, longitudinal component 2008**

Item non-response	persons having received an amount		Full information		Partial information		Missing information	
	total	%	total	%	total	%	total	%
<b>Net income component at personal level</b>								
Employee cash or near cash income (PY010N)	3983	50.89	2617	65.7	577	14.5	789	19.8
Net non-cash employee income (PY020N)	538	6.9	538	100				
Contribution to individual private pension plans (PY035N)	225	2.9	225	100				
Cash benefits or losses from self-employment (PY050N)	641	8.2	526	82.1	47	7.3	68	10.6
Value of goods produced by own-consumption (PY070N)	1315	16.8	1315	100				
Pension from individual private plans (PY080N)	2	0	2	100				
Unemployment benefits (PY090N)	61	0.8	61	100				
Old age benefits (PY100N)	2713	34.7	2531	93.3	176	6.5	6	0.2

Survivor's benefits (PY110N)	773	9.9	773	100.0				
Sickness benefits (PY120N)	40	0.5	40	100				
Disability benefits (PY130N)	645	8.2	43	6.7	348	54.0	254	39.4
Education-related allowances (PY140N)	59	0.8	59	100				
<b>Gross income components at personal level</b>								
Employee cash or near cash income (PY010G)	3983	50.89	2161	54.3	562	14.1	1260	31.6
Net non-cash employee income (PY020G)	538	6.9	538	100				
Contribution to individual private pension plans (PY035G)	225	2.9	225					
Cash benefits or losses from self-employment (PY050G)	641	8.2	508	79.3	64	10.0	69	10.8
Value of goods produced by own-consumption (PY070G)	1315	16.8	1315	100				
Pension from individual private plans (PY080G)	2	0	2	100				
Unemployment benefits (PY090G)	61	0.8	61	100				
Old age benefits (PY100G)	2713	34.7	2531	93.3	176	6.5	6	0.2
Survivor's benefits (PY110G)	773	9.9	773	100.0				
Sickness benefits (PY120G)	40	0.5	40	100				
Disability benefits (PY130G)	645	8.2	43	6.7	348	54.0	254	39.4
Education-related allowances (PY140G)	59	0.8	59	100				

**Table 39 Information on item non-response on individual level - persons 2009, longitudinal component 2009**

Item non-response	persons having received an amount		Full information		Partial information		Missing information	
	total	%	total	%	total	%	total	%
<b>Net income component at personal level</b>								
Employee cash or near cash income (PY010N)	3558	45.76	1630	45.8	1212	34.1	716	20.1
Net non-cash employee income (PY020N)	538	6.9	538	100				
Contribution to individual private pension plans (PY035N)	212	2.7	212	100				
Cash benefits or losses from self-employment (PY050N)	468	6.0	338	72.2	37	7.9	93	19.9
Value of goods produced by own-consumption (PY070N)	1214	15.6	1214	100				
Pension from individual private plans (PY080N)	2	0	2	100				
Unemployment benefits (PY090N)	130	1.7	52	40.0	10	7.7	68	52.3
Old age benefits (PY100N)	2465	31.7	2454	99.6	1	0.0	10	0.4
Survivor's benefits (PY110N)	79	1.0	79	100.0				
Sickness benefits (PY120N)	813	10.5	797	98.0	1	0.1	10	1.2
Disability benefits (PY130N)	654	8.4	495	75.7			159	24.3
Education-related allowances (PY140N)	51	0.66	50	98.0			1	2.0
<b>Gross income components at personal level</b>								
Employee cash or near cash income (PY010G)	3559	45.76	1142	32.1	1240	34.8	1177	33.1
Net non-cash employee income (PY020G)	538	6.9	538	100				

Contribution to individual private pension plans (PY035G)	212	2.7	212	100				
Cash benefits or losses from self-employment (PY050G)	468	6.0	336	71.8	27	5.8	105	22.4
Value of goods produced by own-consumption (PY070G)	1214	15.6	1214	100				
Pension from individual private plans (PY080G)	2	0	2	100				
Unemployment benefits (PY090G)	130	1.7	50	38.5	12	9.2	68	52.3
Old age benefits (PY100G)	2465	31.7	2454	99.6	1	0.0	10	0.4
Survivor's benefits (PY110G)	79	1.0	79	100.0				
Sickness benefits (PY120G)	813	10.5	797	98.0	1	0.1	10	1.2
Disability benefits (PY130G)	654	8.4	495	75.7			159	24.3
Education-related allowances (PY140G)	51	0.66	50	98.0			1	2.0

## 2.4. Mode of data collection

**Table 40. Distribution of household members (RB245=1) by "Data status" (RB250)**

### Wave 1 = 2006

#### Household members 16+

	Total	RB250=11	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	2606	2532	1	20	47	2	4
%	100.0	97.2	0.0	0.8	1.8	0.1	0.2

### Wave 2 = 2007

#### Household members 16+

	Total	RB250=11	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	4950	4834	0	13	39	37	27
%	100.0	97.7	0.0	0.3	0.8	0.7	0.5

#### Sample persons 16+ (RB100=1)

	Total	RB250=11	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	4892	4779	0	11	39	36	27
%	100.0	97.7	0.0	0.2	0.8	0.7	0.6

#### Co-residents 16+ (RB100=2)

	Total	RB250=11	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	58	55	0	2	0	1	0
%	100.0	94.8	0.0	3.4	0.0	1.7	0.0

### Wave 3 = 2008

#### Household members 16+

	Total	RB250=11	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	7890	7827	2	27	26	5	3
%	100.0	99.2	0.0	0.3	0.3	0.1	0.0

**Sample persons 16+ (RB100=1)**

	Total	RB250=11	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	7709	7648	2	27	25	4	3
%	100.0	99.2	0.0	0.4	0.3	0.1	0.0

**Co-residents 16+ (RB100=2)**

	Total	RB250=11	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	181	179	0	0	1	1	0
%	100.0	98.9	0.0	0.0	0.6	0.6	0.0

**Wave 4 = 2009**

**Household members 16+**

	Total	RB250=11	RB250=14	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	7807	7776	1	0	11	17	0	2
%	100.0	99.6	0.0	0.0	0.1	0.2	0.0	0.0

**Sample persons 16+ (RB100=1)**

	Total	RB250=11	RB250=14	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	7446	7416	1	0	11	16	0	2
%	100.0	99.6	0.0	0.0	0.1	0.2	0.0	0.0

**Co-residents 16+ (RB100=2)**

	Total	RB250=11	RB250=14	RB250=21	RB250=23	RB250=31	RB250=32	RB250=33
total	361	360	0	0	0	1	0	0
%	100.0	99.7	0.0	0.0	0.0	0.3	0.0	0.0

**Table 41. Distribution of household members (RB245=1) by “Type of interview” (RB260)**

**Wave 1 = 2006**

**Household members 16+ (RB250=11)**

	Total	RB260=1	RB260=5
total	2532	2022	510
%	100.0	79.9	20.1

**Wave 2 = 2007**

**Household members 16+ (RB250=11)**

	Total	RB260=1	RB260=5
total	4834	3378	1456
%	100.0	69.9	30.1

**Sample persons 16+ (RB100=1 and RB250=11)**

	Total	RB260=1	RB260=5
total	4779	3351	1428
%	100.0	70.1	29.9

**Co-residents 16+ (RB100=2 and RB250=11)**

	Total	RB260=1	RB260=5
total	55	27	28
%	100.0	49.1	50.9

**Wave 3 = 2008****Household members 16+ (RB250=11)**

	Total	RB260=1	RB260=5
total	7827	6318	1509
%	100.0	80.7	19.3

**Sample persons 16+ (RB100=1 and RB250=11)**

	Total	RB260=1	RB260=5
total	7648	6186	1462
%	100.0	80.9	19.1

**Co-residents 16+ (RB100=2 and RB250=11)**

	Total	RB260=1	RB260=5
total	179	132	47
%	100.0	73.7	26.3

**Wave 4 = 2009****Household members 16+ (RB250=11)**

	Total	RB260=1	RB260=5
total	7776	6312	1464
%	100.0	81.2	18.8

**Sample persons 16+ (RB100=1 and RB250=11)**

	Total	RB260=1	RB260=5
total	7416	6065	1351
%	100.0	81.8	18.2

**Co-residents 16+ (RB100=2 and RB250=11)**

	Total	RB260=1	RB260=5
total	360	247	113
%	100.0	68.6	31.4

## **2.5. Imputation procedure**

From many methods (deductive, deterministic, stochastic), which were recommended for imputation of income variables, we used the method of regression deterministic imputation.

The gross income was obtained by summing up net value, income tax payments and compulsory social insurance contributions. If the information on tax and insurance contributions was missing, the amounts were imputed according to labour and social insurance legislations. In some cases where only net income amounts were available these had to be converted to gross values using all necessary information.

The imputation procedure used for solution of item non-response is the following:

Extreme income values were compared with data provided by National Social Security Institute or administrative data sources and data from previous waves, where possible and corrected if necessary.

For imputation of income variables in personal data file the following groups were created:

- Region (NUTS 2)
- Age
- Sex
- Status in employment
- Occupation

## **2.6. Imputed rent**

Imputed rents are estimated for dwellings used as main residence by the households. The imputation is applied for those households that did not report paying rent:

- owners-occupiers
- rent-free tenants

The market rent is the rent due for the right to use an unfurnished dwelling on the private market, excluding charges for heating, water, electricity, etc.

Stratification method based on actual rents is used (the same used by National Accounts – the same stratification variables and the same market rents). The method is in line with ESA'95 and requirements of Commission Decision 95/309 and Commission Regulation 1722/2005 on the principle of estimating dwelling services.

Stratification variables:

- location (district centre with university, other district centre, smaller town, rural area)
- size of the dwelling
- number of rooms (1, 2, 3, 4+)
- amenities – availability of central heating

Actual market rents – main data sources:

- current price statistics
- household budget survey
- real estate agencies

## **2.7. Company car**

The information on the private use of a company car is collected in the individual questionnaire. Here belongs the respondent's estimated amount he/she has gained by using the company car for private purposes. In case of missing value (the respondent was using the company car but did not estimate the amount gained) imputation is applied with the use of hot-deck and regression imputation with simulated residuals methods.

## **3. COMPARABILITY**

### **3.1. Basic concepts and definitions**

There were no essential differences between the national concepts and standard EU-SILC concepts.

#### ***The reference population***

The reference population is all citizens officially living at Bulgarian territory (population de facto). The source of the sample is the Census Population 2001. This Census includes all private households and their current members residing in the territory, independently of any socio-economic characteristics they may have. Persons living in collective households and in institutions are excluded from the target population.

#### ***The private household definition***

No difference to the common definition in either wave (EU-SILC 2006, 2007, 2008 and 2009).

#### ***The household membership***

No differences.

#### ***The income reference period(s) used***

The income reference period is a fixed twelve-month period, namely the previous calendar year. The income reference period for EU-SILC 2006 was 2005, EU-SILC 2007 was 2006, EU-SILC 2008 was 2007 year and for EU-SILC 2009 the income reference period was 2008 year.

#### ***The period for taxes on income and social insurance contributions***

The reference period for income tax repayment and compulsory social insurance contributions was again the years 2005, 2006, 2007 and 2008.

#### ***The reference period for taxes on wealth***

Taxes on wealth paid during the income reference period were recorded properly for 2005, 2006, 2007 and 2008 year.

### *The lag between the income reference period and current variables*

The income reference period is the previous calendar year and the current variables refer to the fieldwork period. Therefore the lag is at minimum 4 months and at maximum 8 months in each wave.

### *The total duration of the data collection of the sample*

EU-SILC was performed on the territory of the whole country as follows:

2006 - between August 1 and August 31;

2007 - between May 4 and August 29.

2008 - between April 1 and July 31;

2009 - between April 21 and July 10.

### *Basic information on activity status during the income reference period*

There are no differences between the national concepts and standard EU-SILC concepts. This information can be obtained by combining the answer for question P6 (PL031) with the answer for question P42 (calendar question), (PL211A—PL211K)

## **3.2. Components of income**

### **3.2.1 Differences between the national definitions and standard EU-SILC definitions**

The differences between the national definitions and standard EU-SILC definitions are as follows:

In the first wave In accordance with EU-SILC 065 (2008 operation) the new income components, mandatory from 2007 operation onwards:

- *PY020G - non-cash employee income;*
- *PY030G – employer’s social insurance contribution;*
- *PY035G – contributions to individual pension plans;*
- *PY080G – pension from individual private plans*
- *HY030G - imputed rent;*
- *HY100G - interest repayments on mortgage;*

have been recorded at component level only and are not included in the household income (variables: HY010, HY020, HY022 and HY023).

Since 2007, the revenue from the use of a company car for private purposes (PY021) is added as a component of the aggregate income

Since 2008 there are no differences between national definition and standard EU-SILC definition.

### **3.2.2. The source or procedure used for the collection of income variables**

Total gross income and disposable household income were calculated according to Document 065 (2008 and 2009 operation). All personal/household income variables were collected through interview.

In some cases, where the information on income component is unavailable a register to obtain missing value information is used. The National Social Security Institute keeps a register of all persons for whom employers pay social insurance contributions and of all self-insured persons. This register contains some data on personal income but it is generated by a labour activity of the persons and more over, this is only the income on which the person was insured.

### **3.2.3. The form in which income variables at component level have been obtained**

The interviewers and the respondents have the option of reporting income gross and/or net at component level. The forms in which the net amounts are recorded in database are net of tax on income at source and of social contributions.

### **3.2.4. The method used for obtaining income target variables in the required form**

The gross income was obtained by summing up net value, income tax prepayments and compulsory social insurance contributions. If the information on tax and insurance contributions was missing, the amounts were imputed in accordance to the labour and social insurance legislations.

If either the net or the gross value was missing for PY010, PY050 or PY100, the missing value was calculated on the basis of a net-gross conversion and vice versa.

Variable PY070 Value of goods produced by own-consumption, which is defined at the level of individual household members, is collected at the household level and later assigned to the head of the household. This is due to the difficult attribution of this income in kind to individual household members (includes mainly small scale farming activities for own-consumption or own-consumption from family businesses).

## **3.3. Tracing rules**

Standard EU-SILC tracing rules are applied.

## **4. COHERENCE**

Coherence refers to the comparison of target variables with external sources. At present there are no reliable external data for the four-year longitudinal sample of 2006-2009.

However, cross-sectional data for EU-SILC 2008 and 2009 were compared to the Household budget survey and Labor force survey. These comparisons can be found in the Bulgarian intermediate quality reports of the years 2008 and 2009.